



May 23, 2025

Durham County, NC

Proposal for an operational assessment study

ORIGINAL

Baker Tilly Advisory Group, LP
205 N Michigan Ave, 28th Floor
Chicago, IL 60601-5927
RFP No. 25-050

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Jonathan Hawley, Purchasing Division
Durham County Purchasing Division
201 East Main Street
7th Floor, Room 703
Durham, North Carolina 27701

Baker Tilly Advisory Group, LP
205 N Michigan Ave, 28th Floor
Chicago, IL 60601-5927
T:+1 (312) 729 8000
bakertilly.com

Dear Jonathan:

Durham County (the County) is looking for an innovative consulting firm to conduct a comprehensive operational assessment. This proposal is the starting point — our vision of how we can achieve your goals to improve efficiency, optimize organizational structure, and assess staffing levels to prepare for the implementation of the County's IT and Finance department in light of the upcoming implementation of a new Enterprise Resource Planning (ERP) system in the fall of 2025.

For a vibrant and growing area with a rich history and a strong community like the County, we know there's not just one finish line. Transformational success means looking beyond your first goal and imagining the next one. And the one after that. And then the one nobody has even thought possible. Your Baker Tilly team will support you through every step of the journey — during your operational assessment study project and beyond.

We are pleased to share that i4x, the consulting arm of the National Forum for Black Public Administrators (NFBPA), will be collaborating as a subcontractor on this project. Their expertise and dedicated approach to advancing Black public leadership will enrich our assessment and help ensure equitable solutions.

We're prepared to redefine what service means for the County. It's not about ticking boxes. It's about creating a strategic foundation for continuous digital transformation while maintaining operational excellence for the County. The approach shared in our proposal shows how important the County will be to us as a client.

We can't wait to get started.

Sincerely,

A handwritten signature in black ink, appearing to read 'Caitlin Humrickhouse'.

Caitlin Humrickhouse, M.P.A., SWP, Principal
+1 (312) 729 8098 | caitlin.humrickhouse@bakertilly.com

Signed Forms



REQUEST FOR PROPOSALS

OPERATIONAL ASSESSMENT STUDY RFP No. 25-050

ISSUE DATE: Date: 4/17/25

ISSUING DEPARTMENT: County of Durham Purchasing Division of Finance, 201 Est Main Street, 7th Floor, Room 703, Durham, NC 27701

Sealed Proposals will be received until 2:00 PM Eastern Time on Thursday May 22, 2025. The purpose and intent of the Request for Proposals (RFP) is to solicit proposals from qualified firms to conduct a comprehensive operational assessment.

All inquiries concerning the Scope of Services, Proposal Submission Requirements or Procurement Procedures should be directed to:

**Procurement Manager: Jonathan Hawley
Purchasing Division**

Email: purchasinggroup@dconc.gov

Telephone: 919-560-0056

Sealed proposals shall be mailed and/or hand delivered to the Issuing Department shown above, and the envelope shall bear the name and number of this Request for Proposals (RFP). It is the sole responsibility of the Proposer to ensure that his/her Proposal reaches the Purchasing Division by the designated date and hour indicated above.

In compliance with this Request for Proposals and to all the terms and conditions imposed herein, the undersigned offers and agrees to furnish the goods and services described in accordance with the attached signed proposal.

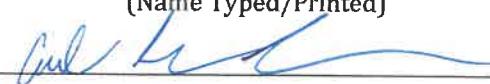
Firm Name: Baker Tilly Advisory Group, LP

Date: 5/13/2025

Address: 205 N Michigan Ave
28th Floor
Chicago, IL 60601-5927

By: Caitlin Humrickhouse Solarge
(Name Typed/Printed)

Phone: +1 (312) 729 8098


(Signature in Ink)

Attachment C

ADDENDUM ACKNOWLEDGEMENT

Operational Assessment Study

RFP No. 25-050

Receipt of the following Addendum is acknowledged:

Addendum no. 1 Date 5/19

Addendum no. _____ Date _____

Signature:  Date: 5/19

Print Name Caitlin Humrickhouse

Title Principal

Name of Firm Baker Tilly Advisory Group, LP

Attachment D

NON-COLLUSION AFFIDAVIT

State of North Carolina
County of Durham

Caitlin Solarge, being first duly sworn, deposes and says that:

1. He/She is the Principal of Baker Tilly Advisory Group, LP, the Proposer that has submitted the attached proposal;
2. He/She is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
3. Such Proposal is genuine and is not a **collusive or sham** Proposal;
4. Neither the said Proposer nor any of its officers, partners, owners agents, representatives, employees or parties of interest, including this affidavit, has in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Proposer, firm or person to submit a **collusive or sham** Proposal in connection with the contract for which the attached Proposal has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm or person to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit or cost element of the Proposal price of any other Proposer or to secure through collusion, conspiracy, connivance or unlawful agreement any advantage against the County of Durham or any person interested in the proposed contract; and
5. The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affidavit.

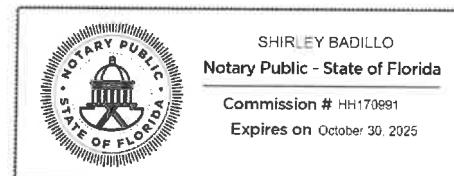
Signed by:

Caitlin Solarge

Signature of Proposer

2025-May-20

Date



(Seal)

This notarial act was an online
notarization.

Notary Public Shirley Badillo

Notary Public

My Commission Expires: 10/30/2025

Signer Caitlin Solarge provided a Florida
driver's license as identification.

Attachment F

AFFIDAVIT OF COMPLIANCE

**STATE OF NORTH CAROLINA
COUNTY OF DURHAM**

**AFFIDAVIT OF COMPLIANCE
with N.C. E-Verify Statutes**

I, Caitlin Solarge (hereinafter the "Affiant"), being duly authorized by and on behalf of Baker Tilly Advisory Group, LP (hereinafter "Contractor") after first being duly sworn hereby swears or affirms as follows:

1. Contractor understands that E-Verify is the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law in accordance with Article 2 of Chapter 64 of the North Carolina General Statutes; and
2. Contractor understands that an "Employer", as defined in NCGS§64-25(4), is required by law to use E-Verify to verify the work authorization of its employees through E-Verify in accordance with NCGS§64-26(a). The term "Employer" does not include State agencies, counties, municipalities, or other governmental bodies.
3. Contractor is a person, business entity, or other organization that transacts business in this State and that employs 25 or more employees in the state of North Carolina. (mark Yes or No)
 - a. YES X
 - b. NO

This 20 day of May , 2025

Signed by:
Caitlin Schary

Signature of Affiant

Print or Type Name: Caitlin Solarge

State of Florida

County of Palm Beach

Signed and sworn to (or affirmed) before me, this the 20

day of May 20 ²⁵

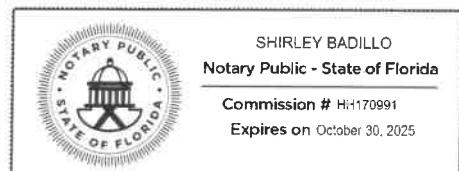
My Commission Expires:

10/30/2025

Shirley Badi

Notary Public

Unitarian Universalist Segments



Attachment G

Signer Caitlin Solarge provided a Florida driver's license as identification.
This notarial act was an online notarization.

Affidavit B

NOT APPLICABLE

ATTACH TO BID - IF YOU ARE NOT UTILIZING SUBCONTRACTORS

State of North Carolina AFFIDAVIT B - Intent to Perform Contract with Own Workforce

COUNTY OF DURHAM

Affidavit of _____
(Name of Bidder)

I hereby certify that it is our intent to perform 100% of the work required for
he _____ contract.
(Name of Project)

In making this certification, the Bidder states that the Bidder does not customarily subcontract elements of this type project, and normally performs and has the capability to perform and will perform all elements of the work on this project with his/her own current work forces; and agrees to provide any additional information or documentation requested by the owner in support of the above statement.

The undersigned hereby certifies that he or she has read this certification and is authorized to bind the Bidder to the commitments herein contained.

Date: _____ Name of Authorized Officer: _____

Signature: _____

Title: _____

SEAL

State of North Carolina, County of _____

Subscribed and sworn to before me this _____ day of _____ 20____

Notary Public _____

My commission expires _____

Attachment A



PROPOSAL FORM
Operational Assessment Study
RFP No. 25-050

In accordance with the attached instructions, terms, conditions, and Scope of Services we submit the following proposal to the County of Durham.

TOTAL PROPOSED COST

\$ 133,000

one-hundred and thirty-three thousand dollars

(Total Proposed Cost in Writing)

The above Total Proposed Cost should be based on being awarded the entire project.

I certify that the contents of this proposal are known to no one outside the firm, and to the best of my knowledge all requirements have been complied with.

Date: 10/24/2025

Authorized Signature:

Caitlin Humrickhouse

Name

Principal

Title

Baker Tilly Advisory Group, LP

Firm Name

Executive summary

Our understanding of the scope of services

Our wheels were in motion from the moment we received your RFP about our operational assessment solutions. Based on what we've learned from you, we understand that the County is focused on preparing for the new ERP system implementation in Fall 2025. Baker Tilly has a proven track record in operational assessments, internal audits, risk consulting, and business process reviews. Our experience spans numerous areas, including financial management, IT system implementations, organizational development, and strategic planning.

Baker Tilly's public sector practice includes professionals dedicated exclusively to government work, allowing them to offer unique insights and effective communication strategies tailored to public-sector needs. Our professionals have varied backgrounds in public administration, IT, finance, strategic planning, and offer a hands-on approach with significant involvement from principals and experienced managers to ensure responsiveness, trust-building, and effective execution.

The primary goal is to maintain operational excellence across all IT and financial services while achieving this transition. Our passionate, dedicated public sector and operational assessment specialists understand this. This assessment will serve as a strategic foundation to ensure Durham County's IT department is well-prepared for the challenges and opportunities associated with the implementation and beyond. Our specific objectives are as follows:

STAFFING READINESS

Baker Tilly will evaluate current staffing levels, skill sets, and resource allocation to ensure adequate support for the ERP implementation. We will identify gaps and make recommendations for hiring, training, or restructuring as needed.

PROCESS OPTIMIZATION

We will assess and refine workflows to minimize operational disruptions during the ERP transition and enhance overall efficiency.

TECHNOLOGY ENABLEMENT

Our team will identify opportunities to leverage automation, system integrations, and modern IT management practices to support both ERP-related and ongoing IT operations.

CROSS-DEPARTMENT COLLABORATION

We will ensure seamless coordination between IT, Finance, and other business units to support the ERP system's successful deployment and adoption.

LONG-TERM SUSTAINABILITY

Baker Tilly will develop a roadmap for maintaining IT operational stability post-ERP implementation while positioning the department for future technology initiatives.

Corporate overview

Guiding you with our resources, reputation and reach

Our ranking as the 10th-largest accounting firm means we're actively leading and shaping the industry landscape. We have a seat at the table with regulators and public sector associations, which translates to the opportunity to share our clients' perspectives and bring valuable insights back to the County.

What does our size mean for you? It's about having a powerhouse team of passionate professionals unafraid to roll up their sleeves and provide hands-on support for the County. It's about team members brimming with thoughtful ideas, backed by the scale of a firm genuinely dedicated to your success.

When you choose Baker Tilly, you're not just choosing a leading advisory, tax and assurance firm. You're choosing a skilled navigator for the road ahead.



10th-
largest U.S.
accounting firm



6,700+
team members,
600+ principals



90+
years in
business



1,800+
Certified Public
Accountants



\$1.81B
firm revenue
in FY2024



50+
U.S. office
locations



250+
workplace and
culture awards

GIVING YOU THE TOOLS YOU NEED TO NAVIGATE THE FUTURE

Baker Tilly will successfully guide the County through changing landscapes with skills, stability and strength as one of the oldest and largest advisory, tax and assurance firms in the United States.

Bringing greater value, relationships and resources to our clients: Baker Tilly and Moss Adams are joining forces

On April 21, 2025, Baker Tilly and Moss Adams announced a planned combination to take effect in early June that will redefine advisory and accounting services for our clients. The merger, which will create the sixth-largest advisory CPA firm in the United States, will bring deeper industry specialization, broader geographic reach and expanded capabilities to the County.

Our unified firm will operate under the Baker Tilly name, forming a leading firm positioned to help the middle-market navigate an increasingly complex environment. Our combination multiplies the value we can deliver through a shared people-first culture, client-centric service model and steadfast commitment to quality.



Upholding tradition while focusing on what's ahead

Baker Tilly was founded in 1931 when we began providing audits to Midwestern canning companies that helped feed our nation. Since then, we have grown to encompass 50 different business combinations, each with its own rich history. We have augmented our scope across sectors, services and areas of expertise to better serve our clients and have expanded our reach from coast to coast and around the globe.



FIRM INFORMATION

Baker Tilly Advisory Group, LP
205 N Michigan Ave, 28th Floor
Chicago, IL 60601-5927
+1 (312) 729 8000

FIRM REPRESENTATIVE

Caitlin Humrickhouse, M.P.A., SWP, Principal
+1 (312) 729 8098
caitlin.humrickhouse@bakertilly.com

Approach

Operational assessments

Our team's strength lies in improving service cost effectiveness and responsiveness in public entity operations. We have firsthand experience transforming departments to be more responsive and align with an organization's overall strategy. This includes the full continuum of strategic services. Moving from a transactional to a tactical or strategic approach has helped clients improve their ability to realign critical resources toward priorities, both within the department and those it supports.

The assessments we have provided have been critical to determining:

- Strategic visioning and operational alignment
- Division of roles and responsibilities
- Reporting relationships
- Workload balancing and resource realignment
- Increased system functionality usage
- Alignment for future growth

Based on our understanding of the needs of the County as outlined in the RFP and based on our prior operational assessments, we have prepared the following plan of work that will form the basis for the engagement.

Phase 1—Project planning and management

This step includes those tasks necessary to solidify mutual understanding of the project scope, objectives, deliverables and timing as well as ensuring that appropriate client and consultant resources are available and well-coordinated.

1.1—Confirm scope, objectives and timing

This task includes a planning and coordination meeting with the project steering committee at the County. The following subtasks will be completed:

- **Finalize project design**—The first study activities will be to:
 - Identify communication channels and reporting relationships/responsibilities of project staff
 - Assign key responsibilities
 - Review and confirm study timelines
 - Review and confirm products to be delivered including expectations regarding the form and level of detail

These meeting(s) will also help establish the desired working relationship between the County and the consulting team. This will include day-to-day interactions with the staff responsible for managing services provided under the contract.

- **Review work plan**—The proposal objectives, scope and approach will be reviewed as well as consultant assignments and specific schedules for the project tasks. We will also prepare "Information Requests" listing key documents to be collected and will identify individuals for interviews.
- **Arrange logistics/administrative support**—Matters to be addressed include schedules for interviews and data collection, workspace and support requirements, specific dates for status reports, contact persons, any remaining contractual matters, etc.

We meet your schedule

We are sensitive to your busy schedule and competing deadlines. We begin every engagement with a mutually agreed-upon timeline. Using that timeline, we develop and commit to a customized client service plan to ensure there are no surprises along the way. The service plan, when finalized and approved by you, serves as a communication and monitoring tool for both of our teams. Other strategies include:

- **Working backward from your identified due dates**—Meeting your deadlines is our number one priority and we take significant pride in making sure that there are never any surprises. Like the County, Baker Tilly recognizes that a surprise-free approach is critical to building trust.
- **Taking an integrated process perspective first, supported by enabling technology**, because we have witnessed the challenges when a project is driven in functional silos or with a sole focus on technology. This includes maintaining the right strategic focus coupled with practical/pragmatic execution orientation, which enables our team to be action oriented as needed.
- **Building trust through hands-on principal and experienced manager involvement**—Unlike other large firms, Baker Tilly commits to significant principal and experienced manager involvement on every engagement. Your principals and experienced managers will actively lead the delivery to support responsiveness, resolve challenges and build trust.
- **Flexibility and an ability to “hit the ground running”**—This is critical for supporting the County with various projects. We stand ready to serve you when you need us, where you need us, for as long as you need us. We are here for you.
- **Setting a clear plan of action**—Through our client service timeline, we work to keep members of your team informed and updated on any open items and the status of your projects at all times.
- **Regular communication with management**—In addition to our formal communication plan, we place emphasis on sharing knowledge of the latest regulatory changes and imparting best practice insight.

1.2—Develop stakeholder outreach and engagement plan

Based on information developed through the initial kickoff meetings, the Baker Tilly team will draft and review a plan for the engagement and involvement of the project sponsor and other specific stakeholder interests and groups. The engagement plan will list the various internal stakeholder interests and groups, suggest engagement methods for each, identify those accountable for completion of the proposed engagement activities, propose a tentative implementation schedule, and conclude with execution activities.

Key activities

- Conduct virtual project kick-off meeting
- Develop project schedule and key milestones
- Confirm list of stakeholders and engagement approach
- Identify, schedule and invite participants in collaboration with the County's steering committee

Phase 2—Assessment of current operations service delivery model

After the project is fully mobilized, we will begin our assessment of the County operations service delivery model and policies with a keen eye toward County-wide goals and values. In our experience, most operational assessments do not fail because the processes or technology were not appropriately aligned. Instead, most failures stem from a lack of focus on the human element of the change.

The purpose of this task is to collect all information needed to understand the current state of processes and technology, operational or system pain points, as well as strategic and tactical objectives for the future. Information collection techniques will include interviews, document accumulation and consultant observations.

2.1—Review background information

- County budget, strategic plan, and capital improvement plan
- Organizational structure
- Staffing levels by position for the department
- Position descriptions
- Department service technology
- Relevant policies and procedures or employee handbooks
- Key performance indicators and operating metrics
- Diversity, Equity and Inclusion initiative documentation
- Collective bargaining agreements
- Previous studies conducted in the last three years
- Other relevant information

2.2—Issue Department-wide survey

Our first point of engagement with the department employees will be through issuing a survey to allow them to share their workload and responsibilities. The survey is customizable and created in coordination with the project sponsors, and may request the respondent to provide:

- Strengths, opportunities and challenges the department and the individual faces to meet County and Department goals
- 5-7 primary responsibilities and estimated percent of their time to conduct the work
- Desired additional training and development to up-skill and better contribute to the County
- Strengths and challenges with existing technology platforms

Baker Tilly will use the survey responses, the position job descriptions, and additional information provided to inform the future meetings. The consultant team will also aggregate survey responses to identify common themes across the department to inform the initial observations.

2.3—Conduct interviews

Your project team is comprises of both public sector generalist and subject matter experts. The project managers only work with the public sector, and are generalists familiar with techniques that work in many settings to increase effectiveness and efficiency. Our subject-matter specialists are former practitioners who know the demands specific to areas such as information technology, public finance, and community leadership positions. Each of our team members and the overall project leadership have a wide range of experience and expertise allowing us to look at the department from different perspectives. Our team members strengthen our ability to create solutions uniquely designed for the individual project.

- Baker Tilly will develop the department project interview schedule with the department project steering committee in Phase One. The general structure and approach we propose include:
 - Begin with one-on-one meetings with the County Manager's office to understand strengths, weaknesses, opportunities and threats. Confirm agreement for what success looks like for the project.
 - One-on-one meetings with department leadership to discuss department and division priorities, staffing challenges, gaps in services or skillsets, and daily responsibilities.

- Focus group meetings based on operations functions with staff to understand how work is distributed, workflows, and technology usage.
- One-on-one meetings with bargaining unit representatives (as requested)
- Focusing on strategic goals and priorities, questions will inquire about structure, processes, culture, employees and other stakeholders. Discussion scope will be confirmed with the County and may include:
 - Primary functions, responsibilities and skills
 - Policy and process implementation at the department level
 - Communication methods
 - Hand-offs withing the department and other departments
 - Service needs met and unmet (with a focus on key performance indicators)
 - Role-based system access
 - Shadow system usage (including excel spreadsheets)
 - Planned growth and associated resource needs

2.4—Document gap analysis of initial observations

- Using the information gained from prior tasks, the consultant team will analyze information collected and develop a set of initial observations to be discussed with the project steering committee. Observations will focus on opportunities to:
 - Re-imagine or redesign existing programs and services to better align with strategic goals
 - Identify gaps in technology, policies, and services and associated staffing or structure needed to meet strategic goals
 - Needed resources to meet results-based metrics and other performance measures
 - Incorporate management and employee feedback from surveys
- The consultant team will discuss the initial observations with the project steering committee to solicit feedback from the observations and discuss the direction and focus of the recommendation development. During this meeting, the project team will also come to consensus with the steering committee to identify high priority items for detailed recommendation development.

Key activities and deliverables

- Develop project introduction memo to distribute prior to interviews and focus groups
- Develop and issue custom employee survey
- Review of all data provided
- Conduct individual and focus group meetings
- Conduct virtual follow-up meetings as needed
- Documentation of gap analysis initial observations
- Meeting to discuss initial observations

Phase 3—Future state analysis and reporting

3.1—Best practice research and operating analysis

Baker Tilly will assess the County's current measures of effectiveness, efficiency, and workload. We will seek to determine if changes are needed either to the process, staffing resources, or reporting lines available to meet the desired metrics. Additional best practice research will be conducted to consider industry standards and metrics commonly used as staffing benchmarks, as well as the department work plans. Steps and resources used may include:

- Analyze service delivery metrics
- Identify technology capabilities and functionality gaps
- Identify employee technical skills needed for responsibility realignments
- Aggregate service delivery challenges and needs
- Identify communication strategy needs
- Research industry best practices. Common resources include:
 - International City/County Management Association
 - Public Sector Human Resources Association

3.2—Comparative community benchmarking

Baker Tilly will work with the County to establish up to eight mutually agreed upon benchmark communities to develop and issue a custom-built survey to solicit program and operating statistics for comparative efficiency and effectiveness. Dependent on the priorities set during project initiation, the survey may include:

- Budgeted FTE
- Filled FTE
- Service ticket requests
- Systems maintained
- Key performance indicators used
- Outsourced services and vendors used

3.3—Preliminary organizational structure design

In the context of our understanding of the County's service delivery processes, we will analyze department staffing and workflow, workload and the distribution of tasks, and skill level needs. The goal of this analysis will be to determine optimal staffing to maintain services while keeping costs as low as possible. Recommendations may include suggestions to reassign, combine, or add positions.

Baker Tilly will prepare preliminary organizational structure recommendations and meet with the department steering committee to review and solicit feedback. The purpose of the meeting is to incorporate the information from the initial observations meeting into a visual structure. Discussion during this stage will focus on validating how functions and responsibilities are divided and prioritization for additional staffing or new positions. While these items will be discussed during the initial observation stage, we find that creating this step to visually see the structure and make adjustments is helpful prior to developing the draft report.

Phase 4—Reporting

4.1—Prepare and issue report

Baker Tilly's consulting team operates under the principal of "no surprises." We make no final recommendations without our client's active involvement and input. While always maintaining our independence and objectivity, we have built-in feedback loops to ensure that we have our facts straight and that both the consulting team and the client understand the ramifications of our recommendations and proposed solutions to identified challenges.

- Baker Tilly will prepare a draft report to include the consulting team's observations and recommendations. Final report will include:
 - Organizational structure recommendations down to the position and full-time equivalent counts
 - Primary roles and responsibilities for new or restructured positions
 - Opportunities to use external resources to provide additional staffing support
 - Observations and recommendations related to processes and technology as it relates to staffing and efficiency
 - Implementation roadmap to prioritize restructure and hiring
- We will review the implementation plan with the project steering committee and make any edits as needed prior to issuing a final report.

Key activities

- Best practice research and survey analysis
- Issue draft organizational structure
- Conduct remote draft organizational structure meeting review with project steering committee
- Draft report development
- Conduct remote draft report meeting review with project steering committee
- On-site presentation to leadership (as requested)

Optional services

Workforce data analysis

The assessment provides a 5-year forecast of potential vacancies in consideration of retirement eligibility and historical vacancy rates. The analysis enables the County to identify best uses of resources for internal talent pool training, coaching and external search strategies to develop a comprehensive workforce succession plan.

Our workforce planning approach identifies opportunities to streamline workforce planning into human capital annual practices, clearly identify the roles and responsibilities of the management team and creates a cyclical approach that prioritizes resources and informs human capital needs for today and future planning.

- Develop the Excel template to analyze a three-year history of position data to identify high turnover positions by department and division (dependent on available data).
- Develop the Excel template to analyze current employee census data, segregating data by department, division and association affiliation (if applicable). Baker Tilly will manipulate the data and build formulas to incorporate retirement eligibility and identify potential vacancies in the coming five years.

The vacancy forecasting analysis is the preliminary step of Baker Tilly's strategic workforce succession planning practice. The full scope of workforce succession planning includes development of core competencies, identification of training to optimize resources for professional development, gap assessment of existing recruitment strategies and integration for performance management and training programs.

Delivering a project schedule to meet the County's expectations

The chart below represents our customized approach to deliver operational assessment services to the County on time. And it's just our starting point. We'll collaborate closely with you to finalize a client service plan that meets all your needs — especially your timing.

APPROACH

PHASE	JUL	AUG	SEP	OCT	NOV	DEC
Phase 1—Project planning and management						
Phase 2—Assessment of current operations service delivery model						
Phase 3—Future state analysis						
Phase 4 – Reporting						

OUR COMMITMENT TO THE COUNTY

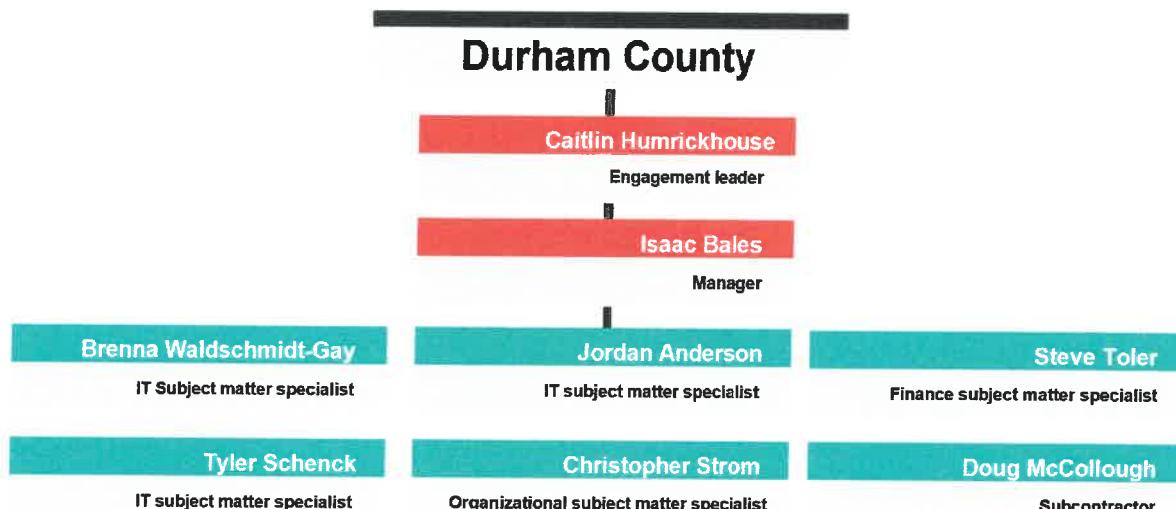
Working closely with you and your team, we will co-develop a timeline to deliver on time or ahead of schedule.

Baker Tilly recognizes that our approach must be flexible and adaptable. We will maintain open communication throughout the engagement and adjust the approach and timing as required. As appropriate interviews, focus group sessions, workshops and reviews of deliverables will be conducted remotely and/or onsite.

Organization and staffing

Leading the County's operational assessment services and uncovering opportunities along the way

Meet the operational assessment team we've assembled to achieve everything you envision. Selected intentionally for your goals and backed by our specialized resources, these individuals are collaborative and multidisciplinary. Their passion for the public sector will make them an unstoppable force on your behalf. You'll find an org chart and team chart below and complete resumes in the **Appendix**.



THE TEAM TO ACHIEVE THE COUNTY'S GOAL

Caitlin Humrickhouse, MPA, SWP — Engagement leader



Caitlin Humrickhouse is a principal with Baker Tilly and oversees the Public Sector Advisory team management consulting services with a focus on assisting governmental entities in their efforts to ensure the resources available (people, processes and technology) are utilized in the most efficient manner and support strategy. She serves in a leadership capacity in Baker Tilly's Public Sector Advisory team, ensuring that clients receive high quality deliverables from a team of dynamic and professional consultants. She is ultimately responsible for the County's satisfaction with Baker Tilly's services.

Isaac Bales — Project manager



Isaac's sole focus is the public sector, with an eight-year track record of working with public utilities, local governments, special districts and other public sector organizations. Over the years, he has served these organizations in various capacities, including municipal advisor, project manager, and business partner. Isaac's diverse project experience has allowed him to specialize in areas such as human resource process reviews, organizational and operational assessments, cost-benefit analyses, and software selection services. While focusing on these areas, his prior experiences allow him to understand the larger goals and objectives at play

ORGANIZATION AND STAFFING

Jordan Anderson — IT subject matter specialist



Jordan brings more than 20 years of experience in strategy, planning, analytics and digital solution architecture across numerous business functional areas and industries.

With experience as a strategic team leader, analyst, architect and developer of analytics and AI solutions, Jordan helps businesses align their goals with Baker Tilly's strategic and technological resources.

He applies a business-first approach throughout the entire analytics and data strategy life cycle, from defining expectations and creating a data solution blueprint to identifying design patterns, models and best practices to managing and leading consultant teams and driving execution.

Steve Toler — Finance subject matter specialist



As a consultant, Steve has led more than a dozen fiscal planning efforts for cities and special districts. These projects involved constructing interactive fiscal models with dashboards that display key fiscal indicators such as fund balance, annual deficit or surplus and adjustable key assumptions.

Steve possesses skills and knowledge in various areas, including budgeting and revenue forecasting, financial management and reporting, accounting, purchasing, information technology management, water and wastewater rate modeling, regional shared services planning, organizational development and training, labor relations and negotiations, business continuity planning, risk management, economic development and redevelopment, tax ballot measures, and public engagement.

Tyler Schenck — IT subject matter specialist



Tyler's local government experience includes a diverse range of roles for the County of Winchester, Virginia over an 11-year period, serving most recently as the County's chief information officer. In that role he led a diverse portfolio of projects and initiatives, provided direct executive oversight of the administration's performance measurement, data analytics and technological resources, and incorporated an agile framework to support the increasing needs and complexities of a rapidly growing organization. Other roles in Winchester included director of innovation and information services; program manager in the County manager's office; interim director of both economic redevelopment and human resources; and grants coordinator.

Christopher Strom, MPA — Organizational subject matter specialist



Christopher specializes in various aspects of government, joining Baker Tilly with direct public sector industry experience and a Master of Public Administration. A public sector consultant, he is well versed in information technology operations and industry best practices. He specializes in providing creative solutions for operational and cost efficiency within the public sector, including shared services, staffing augmentation and strategic sourcing. He serves clients by providing perspective and thought leadership on human capital, change management and employee compliance projects.

Christopher will serve as a consultant assisting with interviews, analysis, reporting and administrative tasks.

ORGANIZATION AND STAFFING



Brenna Waldschmidt-Gay — IT Subject matter specialist

Brenna's more than five years of experience has primarily focused on project management and digital strategy. She has supported projects in a variety of industries including financial services, energy, higher education, government contractors and public sector.



Doug McCollough — Subcontractor

Doug McCollough serves as a Consultant, and Advisor and has worked to connect people to opportunities, remove barriers, and promote change in initiatives ranging from Smart and Connected Cities, IT Workforce Development, expanding broadband access, Connected and Autonomous Vehicles, and technology driven Economic Development. He has spoken as a Subject Matter Expert and advocate on technical subjects, diversity and inclusion, using technology for community development and now serves as an advisor and consultant for communities and organizations.

AN INTEGRATED TEAM WORKING TOGETHER FOR SUCCESS

Each professional on your team was selected for a reason, but it's our collective brainpower and collaboration that will ultimately make a difference for the County.

Partnership with the National Forum for Black Public Administrators (NFBPA)/Institute for Excellence in Public Service (i4x)

The National Forum for Black Public Administrator's Institute for Excellence in Public Service (i4x) in partnership with Baker Tilly, LLP, is pleased to offer a proposal to provide staffing utilization and benchmarking services to the County.

The National Forum for Black Public Administrators (NFBPA) is a nonpartisan, 501©(3) organization, founded in 1983, with more than 2,500 members nationwide, who are leaders and managers of public programs and agencies in more than 350 jurisdictions. It is the principal and most progressive organization dedicated to advancing Black public leadership in local and state governments. A central element of NFBPA's mission and practice is leadership development through mentoring, coaching, knowledge transfer and other techniques. These are all critical to providing practical, technical assistance to municipalities.

NFBPA's consulting arm, the Institute for Excellence in Public Service (i4x), incorporated in 2019 and based in Washington, DC, provides services throughout the United States. We use highly qualified and seasoned public administration executives who have the desire and ability to share their subject matter expertise as consultants. i4x uses consultants with the credentials and desire to provide quality consulting services to all sizes of local jurisdictions, state agencies and not-for-profit organizations. i4x brings an equitable and inclusive lens to our work. It is essential to use this lens in the current environment where organizations are coping with the lingering effects of COVID-19, economic challenges and calls for racial justice and equality. i4x is uniquely positioned to address these challenges.

We intend to subcontract 25% of the contract to i4x. Doug McCollough will provide subject matter expertise in the operations of municipal IT departments, including those that have embarked on ERP implementations.

The i4x leadership team has extensive experience working in large and medium-sized local governments that operate municipal utilities (water, sanitary sewer, stormwater, gas and electric), non-profits, university settings and quasi-governmental entities such as airports, transit authorities and convention centers. It also has significant expertise in evaluating governmental services.

ORGANIZATION AND STAFFING

i4x is not limited to a few employed staff. Instead, our operation model permits us to use the various skills resident in our membership to create work teams specific to the assignment, allowing the best consultants at a reasonable cost.

Qualifications and experience

Delivering specialized expertise to our public sector clients

State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other sectors. Recognizing this complexity and eager to serve as a true valued advisor to the public sector, Baker Tilly formalized its dedicated public sector specialization more than 50 years ago. **Today, more than 350 Baker Tilly professionals — including nearly 30 principals** — focus directly on serving governments and provide hundreds of thousands of client service hours annually to organizations like the County.

Nationwide, our public sector practice serves nearly 4,000 state and local governmental entities, including municipalities, counties, school districts, utilities, transit organizations, airports and special authorities. Several of these client groups are now served by dedicated specialists in distinct sub-practices.



COMMITMENT TO THE PUBLIC SECTOR

Baker Tilly has been in business for more than 90 years, and public sector entities were some of our first clients.

The County will benefit from our public sector specialization in several specific ways:

- **Dedication to the public sector:** Your engagement team members live and breathe government and work exclusively with the public sector year-round. This translates into insights only experience can bring, as well as an understanding of the best ways to communicate and collaborate with public-sector entities.
- **Specialized training and continuing education:** the County can be assured of an engagement team with the necessary skills and timely knowledge to effectively perform your engagement.
- **Sector involvement:** Members of our public sector practice are leaders in key sector organizations, including the International City/County Management Association (ICMA). Because of our work with these groups, we know about dynamic trends and consequential developments in state and local government — and are equipped with leading practices to help the County best respond to them.
- **Knowledge sharing with the County:** At Baker Tilly, serving governments goes beyond delivering services — we also supply our clients with crucial thought leadership in the form of webinars, workshops, articles and our regular newsletter, CommuniTIES.
- **Year-round consultation:** Throughout our relationship, we will be available for routine calls and technical questions, connecting you with recommendations and ideas to address the inevitable operational issues that arise. We can also alert you to new opportunities for us to collaborate and create value for the County.

QUALIFICATIONS AND EXPERIENCE

Serving large governmental entities

In recent years, Baker Tilly has undertaken numerous operational assessments, organizational assessments, and staffing studies for a diverse array of public sector clients across the nation. Our extensive experience in these areas is exemplified by our work with municipalities, counties, and other governmental entities, providing them with tailored insights and recommendations to enhance efficiency, effectiveness, and service delivery. The following is a representative list of our recent operational assessments, organizational assessments, and staffing studies.

Client name	Project Name
• Santa Maria, CA	• Organizational Assessment
• Washington County, MN	• Community Services Finance Operational Assessment
• Long Beach, CA	• Civil Service Process Review
• Charlotte, NC	• Charlotte Area Transit System Risk Assessment
• Covington, KY	• HR Department Organizational Assessment
• El Segundo, CA	• Organization Assessment of the City Clerk's Office
• Sutter County Sheriff's Office, CA	• Organization and Staffing Assessment
• Yakima, WA	• Yakima Finance Dept Org Assessment
• Northfield, MN	• Org. Assessment - Administrative Division
• Altadena Library District, CA	• Performance Evaluation
• Sebastopol, CA	• City Council Goal Setting
• Town of Carrboro, NC	• Town-Wide Organizational Structure and Staffing Review
• Union Sanitary District, CA	• IT Assessment
• San Luis Obispo, CA	• Maintenance Division Org. Review
• St. Paul, MN	• Staffing Study - Organizational Review of Legislative Services

Information Technology Specific Support

Digital transformation provides your organization with the opportunity to become more efficient, transparent and insightful so you can deliver a more meaningful relationship with your customers. However, leveraging advancements in new technology and making decisions today to shape tomorrow is never easy.

Baker Tilly can integrate your digital strategies, provide innovative thinking and deploy advanced technology solutions to help you unlock the true potential of your organization.

Baker Tilly assists our clients in leveraging new technology to solve their most pressing problems and to capitalize on new opportunities. Our team of experienced professionals includes advanced technologists, data scientists, intelligent automation practitioners and emerging technology leaders that bring innovative solutions regarding the introduction, prototyping, design and implementation of advanced technology solutions.

The team is focused on the integration of advanced technologies with core business transformational services to help the County successfully navigate the complexities of staffing needs for digital transformations.

QUALIFICATIONS AND EXPERIENCE

Our digital service offerings



Digital strategy

We understand how a cultivated and tactical plan enables your goals and better prepares your company for digital transformation. Our digital strategy team is here to guide your team with a structured approach to enable organizational change, streamline operations and drive greater return from achieving your digital transformation goals.



Cloud services

Chances are, the business environment you face today looks quite a bit different than just a few years ago. Fortunately, cloud is revolutionizing business in ways that can help you keep up, giving life to new products and services. Baker Tilly Digital can implement, scale and secure your cloud technology to help you leverage it for innovation and growth.



Data solutions

Capturing the data that matters most and bringing it into focus is no trivial matter. Rely on our experience to drive your business forward. At Baker Tilly Digital we help our clients derive value from data, whether it's through advanced machine learning, data visualization or working to implement new data processes for a "single source of truth."



Enterprise solutions

Selecting, implementing or optimizing an enterprise technology solution is a complex endeavor. Our experienced team works with you to understand your business and pain points, highlight opportunities and develop enterprise solutions options attune to your needs. It's not just what you implement, it's how you transform the business that will make a lasting difference.



Application services

Introducing innovative applications and services into uncharted territory opens you up to opportunity — and risk. We help you successfully blaze the trail. Baker Tilly Digital's experience enables us to envision and create custom solutions that enhance customer engagement and refine your operational efficiency.

Sharing our Oracle industry experience

Among consulting firms that serve the public sector ecosystem, few have expertise and capabilities spanning the complete spectrum of public sector operations. Baker Tilly does. We have assisted our clients in forging numerous mutually beneficial relationships that merge the diverse (and often divergent) interests of technology organizations.

Baker Tilly has invested significant time and resources in growing our public sector practice, and this industry vertical has grown substantially and steadily over the past decade providing services ranging from management consulting, technology implementation to risk, audit, tax and cyber security services.

Benefits of our public sector experience

These experiences mean that, by choosing us, the County can expect to gain consultants with:

- A deep understanding of the industry's risks, and opportunities
- Unmatched depth and breadth of skilled resources focused on healthcare, giving us flexibility and scalability to tailor our services
- Decades of experience in serving diverse industry ecosystem clients assuring the County of insights into leading practices, creativity in addressing your immediate issues and concerns, and an understanding of the nuances and cultural complexities of working in complex public sector environments
- A diverse offering of advisory, cloud implementation, risk, audit, and cyber security services enabling us to evolve with the County's changing needs

QUALIFICATIONS AND EXPERIENCE

Demonstrating that we've been down this path before

The experiences of our clients speak more about Baker Tilly's capabilities than any proposal ever could. That's why we encourage you to talk with our clients. Here are a few individuals who welcome the opportunity to share their Baker Tilly experience.

Each will give you an authentic perspective as you consider your own needs.

MILWAUKEE COUNTY, WISCONSIN

Name	Matt Johnson	Title	IT Director
Phone	+1 (414) 278 7856	Email	robert.johnson@milwaukeecountywi.gov
Dates of contract	July 2022 to December 2022		
Scope of Work	Focused on digital transformation initiatives to move from traditional manual processes to more automated, digital solutions. Baker Tilly helped identify outdated processes or system deficiencies, recognized and set objectives for improved services based on IT capabilities and developed a prioritized digital transformation roadmap of follow-on projects with an independent perspective on how to best use the funds.		
Annual contract amount	\$360,000		

UNION SANITARY DISTRICT, CALIFORNIA

Name	Christopher Pachmeyer	Title	Coach, Electrical and Technology
Phone	+1 (510) 477 7676	Email	chrispa@unionsanitary.ca.gov
Dates of contract	December 2023 to September 2024		
Scope of Work	Baker Tilly was commissioned by Union Sanitary District (USD) to evaluate its Information Technology (IT) team with the goal of identifying performance gaps and providing recommendations for improvement. The assessment was centered around the district's service delivery, structure and organization in accordance with current operational needs and best practices. This review presented an opportunity for USD to strategically enhance its IT landscape to support its mission and goals effectively in the face of rapid technological advancements. Addressing staffing deficiencies, refining organizational structures and aligning IT practices with industry advancements are essential steps for the district to take to adapt to the evolving demands of the industry and safeguard its infrastructure against potential threats.		
Annual contract amount	\$60,000		

LAKE COUNTY, INDIANA

Name	Scott Schmal	Title	Director of Finance
Phone	(219) 755-3000	Email	schmasc@lakecountyin.org
Dates of contract	2023 - 2024		

QUALIFICATIONS AND EXPERIENCE

Scope of Work	Baker Tilly was engaged to remediate a problematic Oracle Cloud implementation that had resulted in significant operational and compliance challenges. Our team assumed responsibility for managed services, led a comprehensive reimplementation and optimization of the Oracle Cloud platform, and provided advisory support. This included correcting data integrity issues, enhancing financial reporting capabilities, establishing formal closing procedures, and ensuring compliance with state audit standards. Our collaborative and structured approach enabled the County to regain financial accuracy, transparency, and audit readiness.
Annual contract amount	Multiple projects totaling over \$2.5 million

INDIANA ELECTION DIVISION

Name	Brad King	Title	Co-Director of Indiana Election Division
Phone	+1 (317) 233 0929	Email	bking@iec.in.gov
Dates of contract	2017 - 2021		
Scope of Work	Baker Tilly assessed digital transformation needs and managed the completion of the \$18.9 million in projects across State of Indiana Election Division and Secretary of State modernization and cybersecurity programs, which were delivered on time and on budget between a 2017-2021 contract term, creating significant usability improvements for Indiana's population of 6.7 million and the 92 counties that serve their constituents.		
Annual contract amount	\$75,000		

EXPERIENCE MATTERS. ESPECIALLY THE EXPERIENCE OUR CLIENTS RECEIVE

Connect with our clients to learn more. Additional references are available on request.

MWBE participation

Leveraging the skills of diverse subcontractors

We've explored subcontractor options nationwide, and from among the best, we've built positive, successful relationships with many S/M/W/DBE firms.

As specialists in serving public sector organizations, sometimes subcontracting up to 50% of our work is a requirement. Occasionally, a subcontractor may have specific skills or knowledge we can leverage to serve our clients' best interests. We seek opportunities to collaborate with S/M/W/DBE firms whenever their skill sets align with a project's scope and geographic location, and we make sure the work these subcontractors do will not only help our clients but will also help strengthen their competitive market presence and experience.

For the County's project, we intend to collaborate with i4x. Details on the collaboration, utilization plan and projects roles are included in the Organizational and staffing section above.

Diversity, inclusion, belonging and societal impact (DIBS)



SHANE LLOYD,
CHIEF DIVERSITY OFFICER

Shane leads our firm's DIBS strategic initiatives and serves on influential national diversity and inclusion boards.

To move forward, you have to open doors. Because a workforce built by prioritizing diversity, inclusion, belonging and societal impact (DIBS) is just that — a force. For new ways of thinking, plotting new opportunities and achieving more than anyone ever thought possible. DIBS is how we push the boundaries of potential for ourselves — and for the County.

When every team member's identity, perspective and contributions matter, every team member grows — and that's how we can help our clients achieve their goals. It doesn't happen by chance. It takes smart, intentional work to find and hire individuals who can contribute at that level of innovation. People like our chief diversity officer, Shane Lloyd, who joined Baker Tilly as DIBS strategy leader in 2021.

The benefits of DIBS to our organization and yours are clear. And it's much more than a box to check. It's a way of life. We've built DIBS into our organization's leadership structure, beginning with our DIBS steering

committee. The members are a cross section of leaders from across our firm, representing every level and every area of our firm and ensuring that all experience a vibrant culture of diversity, inclusion, belonging and societal impact. Their efforts have created a robust DIBS ecosystem, where groups, initiatives and deep networks of committed team members have embedded DIBS into the day-to-day workings of our organization. [Learn more here.](#)

DIBS communities and signature initiatives

Activate team member network



Belonging means creating a workplace that can include everyone. Activate's mission is to unite and empower team members who are neurodiverse or have physical disabilities to reach their full potential and contribute to a more accessible workplace.

Diversity is who we are

Baker Tilly celebrates and values the identities, perspectives and contributions of everyone, embedding diversity, inclusion and belonging into all aspects of our business. We don't stop there; we recognize there are always opportunities to take this important initiative further.

MWBE PARTICIPATION

Growth and Retention of Women (GROW)



When women grow, we all grow. The GROW initiative provides women with opportunities to network, acquire skills, strengthen professional relationships and advance in their careers. This increases the number of women in management positions and enhances the retention of women at all firm levels.

NexGen: Joining workforce generations



We don't stop at building a firm — we're building a future. NexGen empowers the next generation of team members to collaboratively engage in our firm's progress while promoting an overall investment in our future.

PRIDE team member network



Our PRIDE team member network supports the LGBTQ+ community and their allies within Baker Tilly. We strive to create an open environment centered on LGBTQ+ issues and topics relevant to the workplace.

Supporting Opportunity, Advancement and Recognition (SOAR)



To build the most innovative and productive workforce, you need to focus on improving inclusion and increasing retention of team members of color. Within SOAR, our team-member-led Black, Latinx, and Asian American and Pacific Islander (AAPI) communities provide spaces for conversation, relationship-building and engagement.

Baker Tilly Foundation



Baker Tilly stands against racism and discrimination in any form. Our Baker Tilly Foundation supports causes within key pillars, including human services organizations that advance well-being, equity and inclusion.

Conflict of interest

Baker Tilly is not aware of any involvement of the firm, its employees, or owners that would constitute a conflict of interest.



Appendix: Resumes

Caitlin M. Humrickhouse, M.P.A., SWP

Caitlin Humrickhouse is a principal with Baker Tilly's public sector advisory practice.



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Education

Master of Public Administration with
a concentration in financial
management
University of Illinois at Chicago

Bachelor of International Business
Bachelor of Spanish
University of Illinois at Urbana–
Champaign

Caitlin is a strategic workforce planner with a deep understanding of succession planning and strategic human capital management. Caitlin's other areas of expertise include benchmarking, organizational redesign and system needs assessment and selection. Prior to joining the firm, she worked at the University of Illinois at Chicago performing program and market analyses for an online education unit.

Specific experience

- Provides management consulting services with a focus on resource optimization, assisting governmental entities in their efforts to ensure the resources available (people, processes and technology) are utilized in the most efficient manner
- Reviews and redesigns core business processes to enhance internal controls, align with industry best practices, leverage available technology and create efficiencies
- Performs organizational structure analyses for local governments, examining the current state versus the future optimal state of job functions and departments
- Offers technology needs assessment and system selection services to help organizations achieve strategic goals by leveraging technology
- Prepares organizations to be sustainable and resilient in the face of workforce challenges and fiscal pressure through the application of operational and organizational reviews, succession planning and technology implementation

Industry involvement

- Illinois Association of Municipal Management Assistants
- Illinois City/County Management Association (ILCMA)
- Institute of Internal Auditors (IIA)
- International City/County Management Association (ICMA)

Community involvement

- Step Up
- Chicago Chapter of the U.S. National Committee for United Nations Women

PRINCIPAL

Caitlin M. Humrickhouse, M.P.A., SWP

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Thought leadership

- [CommuniTIES: How to overcome today's workforce challenges](#), podcast appearance, July 2024
- Environmental, social and governance, presenter, October 2023
- [Environmental, social and governance - a public sector webinar series](#), presenter, February 2023
- [Workforce and succession planning – part 3: training and competitiveness](#), author, November 2022
- [Workforce and succession planning – part 2: core competencies and top talent](#), author, November 2022
- [Workforce and succession planning – part 1: getting started](#), author, October 2022
- [The strategies and challenges of managing an evolving workforce](#), author, July 2022
- [Strategic talent management](#), author, July 2022
- [Recession proofing: six actions governments and not-for-profits should take to prepare for revenue shortages](#), author, April 2020

Continuing professional education

- Strategic Workforce Planner, Human Capital Institute

Isaac Bales

Isaac Bales is a manager with Baker Tilly's public sector practice.



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Education

Bachelor of Science in finance
Butler University
(Indianapolis, Indiana)

Isaac's sole focus is the public sector, with an eight-year track record of working with public utilities, local governments, special districts and other public sector organizations. Over the years, he has served these organizations in various capacities, including municipal advisor, project manager, and business partner.

Specific experience

- Provides organizational and operational assessments aimed at improving efficiency and effectiveness of operations through processes, use of technology, organization and staffing, and alternative service delivery
- Provides technology assessments and consulting services, including needs assessment, requirements gathering, request for proposal development, proposal evaluation and vendor demonstration coordination for entities seeking enterprise resource planning systems, work order asset management and other solutions
- Conducts process documentation and advises on specific process step optimization

Industry Involvement

- American Public Power Association (APPA)
- American Public Works Association (APWA)
- Public Sector HR Association (PSHRA)

Continuing professional education

- Project Management Professional (PMP)
- Registered Municipal Advisor with the Securities and Exchange Commission
- Public Sector HR Association Certified Professional (PSHRA-CP)

Thought leadership

- [Utility University: Workforce development- helping you transition towards new energies](#), presenter, October 2022
- How to Build a Talent Pipeline, APPA National Conference, 2023

Jordan Anderson

Jordan Anderson is a director with Baker Tilly's digital solutions practice.



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Education

Bachelor of Business in business information management
Western Illinois University

Jordan brings more than 20 years of experience in strategy, planning, analytics and digital solution architecture across numerous business functional areas and industries.

With experience as a strategic team leader, analyst, architect and developer of analytics and AI solutions, Jordan helps businesses align their goals with Baker Tilly's strategic and technological resources.

He applies a business-first approach throughout the entire analytics and data strategy life cycle, from defining expectations and creating a data solution blueprint to identifying design patterns, models and best practices to managing and leading consultant teams and driving execution.

Specific experience

- Cross-functional team management: Led project teams in strategic planning and prioritization, ensuring alignment between internal and external groups for cohesive development and delivery
- Strategic advisory: Conducted assessments on data strategy, maturity, and readiness for clients across various industries including insurance, retail, marketing, logistics, energy and manufacturing
- Data and AI governance: Established data governance programs to improve organizational use of data and AI, addressing regulatory, societal and internal risks
- Data warehouse design: Developed data warehouse and operational database solutions to provide insights at both strategic and operational levels
- Statistical modeling: Created statistical models to streamline business processes and augment decisions
- Machine learning and AI: Implemented machine learning and AI projects, including sentiment analysis, language models, natural language processing, computer vision and optical character recognition (OCR)
- Cloud data migration: Developed plans for migrating on-premise systems to cloud environments
- Analytical dashboarding: Managed the process of defining requirements and discovering data for the development of operational and strategic dashboards, using data visualization tools to drive data-driven decisions

DIRECTOR

Jordan Anderson

Page 2

Specific experience, (cont.)

- Technical expertise: Microsoft Azure IaaS/PaaS, Amazon Web Services (AWS) IaaS/PaaS, Microsoft Fabric and Power BI, Microsoft SQL Server, Microsoft Analysis Services, Microsoft Integration Services, Azure SQL Database, Azure SQL Data Warehouse/Synapse, Azure Data Factory, Azure Data Lake, Snowflake, - Databricks, Dimensional data modeling (Kimball & Data Vault methodologies), Streaming, real time analytics, LangChain, LLM applications, Azure OpenAI API, Azure Machine Learning
- Languages: Python, C#, JavaScript, ANSI SQL, T-SQL, BIML, DAX

Steve Toler

Steve Toler is a director with Baker Tilly's public sector advisory practice.



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Education

Master of Public Administration
Bachelor of science in business administration
California State University, East Bay

Steve joined the firm after nearly 20 years in local government public service, working for the California cities of Cupertino, Foster City and Millbrae. He has served in management positions ranging from assistant city manager to information technology manager. Steve possesses skills and knowledge in various areas, including budgeting and revenue forecasting, financial management and reporting, accounting, purchasing, information technology management, water and wastewater rate modeling, regional shared services planning, organizational development and training, labor relations and negotiations, business continuity planning, risk management, economic development and redevelopment, tax ballot measures, and public engagement.

As a consultant, Steve has led more than a dozen fiscal planning efforts for cities and special districts. These projects involved constructing interactive fiscal models with dashboards that display key fiscal indicators such as fund balance, annual deficit or surplus and adjustable key assumptions.

In his role as budget director of Foster City, Steve implemented collaborative approaches with departments to prepare their operating budgets, five-year financial plans, and capital improvement plans. He conducted analyses of personnel, services and supplies, and capital outlay to ensure a realistic allocation of budgeted resources, helping departments achieve the City Council's goals.

Steve serves clients across the United States, including recent fiscal model and fiscal sustainability engagements for the Washington cities of Newcastle, Kenmore and Sammamish; the Oregon cities of Beaverton and Tigard; and the California cities of Santa Cruz, Scotts Valley, Belmont, East Palo Alto, El Cerrito, Pleasanton, San Leandro, St. Helena, Tracy, Union City and the Town of Windsor.

Tyler Schenck

Tyler Schenck is a consultant with Baker Tilly's public sector advisory practice.



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Education

Master of Public Administration
West Virginia University

Bachelor of Arts in political science
Bachelor of Arts in national
security and intelligence
Fairmont State University

Dynamic professional with extensive experience in project management, execution of enterprise strategy and achieving transformative growth with a proven ability to lead diverse teams. Substantial experience in facilitating positive change and organizational progress in administrations that have lacked prior effective management and are subject to heavy public scrutiny. Clear capacity to adapt leadership style and communication to ensure impactful dialogue with teams and stakeholders of diverse backgrounds.

Strong communication skills with a desire to tackle complex enterprise issues. Demonstrated commitment to serving the public and data-driven decision-making as displayed by appointment to the Virginia Data Advisory Commission by the honorable Governor Northam

Specific experience

- Leveraged teambuilding and management skills to revitalize an information technology department that was on the cusp of privatization/outsourcing after a lengthy period of mismanagement and stagnation. Utilized project management and communication abilities to influence executives to reallocate resources while incorporating strategic planning practices to stabilize the department and provide a clear direction into the future
- Displayed profound leadership skills and management practices while appointed to various interim executive roles to oversee several departments that suffered from critical mismanagement and lack of direction in addition to serving as program manager. Forged key relationships with stakeholders and outside agencies to leverage mutually beneficial partnerships and managed a complex portfolio of projects across multiple disciplines while functioning as chief of staff for the city's chief executive and governing board
- Interim economic redevelopment director - applied key negotiation tactics and creative financing techniques to manage several multifaceted (re)development projects subjected to extensive public evaluation and scrutiny. Conducted extensive market research and utilized various communication styles to attract substantial commercial investment
- Interim human resources director - assumed executive human resources duties during a transition period while reestablishing the credibility of the department and facilitated the recruitment of a permanent appointee to the position. Instilled confidence in the capabilities of the department and its staff while establishing a positive rapport with all employees seeking resources or support
- Grants coordinator/project specialist - managed a portfolio of complex funding applications and grant-funded projects to support infrastructure rehabilitation and restoration of blighted real estate

CONSULTANT

Tyler Schenck

Page 2

Continuing professional education

- Project Management Professional, Project Management Institute
- Certified Information Security Manager, Information Systems Audit and Control Association (ISACA)
- Certified Scrum Product Owner
- Certified SAFe 5 Agilist

Awards and recognition

- Formerly appointed to the Virginia Data Advisory Commission by the honorable Governor Northam

Christopher Strom, MPA

Christopher is a senior consultant of public sector advisory team, joined Baker Tilly in 2019.



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Education

Master of Public Administration
Bachelor of Science in law enforcement and justice administration
Western Illinois University (Macomb, Illinois)

As a senior consultant on the public sector advisory team, Christopher is staffed on various types of projects such as, strategic planning, comprehensive planning, organizational/operational reviews, business process reviews, system implementation, and many others.

Christopher specializes in multiple aspects of government, joining Baker Tilly with four years of industry experience. During his time before joining the public sector team, Christopher has experience within parks and recreation, public works, information technology, administration, finance, community development, public safety, and capital project planning. Following his education, he has held various positions with the Elmhurst Park District, the Village of Itasca, the DuPage mayors and manager's conference, and the Village of Kenilworth.

Aside from his career experience and education, Christopher takes pride in creating trusting professional relationship with the goal of delivering effective results.

Specific experience

- Budgeting
- Business process review
- Comprehensive planning
- Customer service
- Financial system implementation
- Grant writing and post award management
- Operational and organizational policy audit
- Operational and organizational reviews
- Policy creation and implementation
- Project management
- Strategic planning

SENIOR CONSULTANT

Christopher Strom, MPA

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Industry involvement

- Illinois City/County Management Association
- Illinois Association of Municipal Management Assistants

Community involvement

- PADS Shelter Program (homeless shelter volunteer)
- Habitat for Humanity Certified Fraud Examiner (CFE)

Brenna Waldschmidt-Gay

Brenna is a manager with Baker Tilly's digital solutions practice.



Baker Tilly Advisory Group, LP

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brenna.waldschmidt-gay@bakertilly.com

bakertilly.com

Education

Bachelor of Business Administration in finance and marketing
Loyola University of Chicago

Brenna's more than five years of experience has primarily focused on project management and digital strategy. She has supported projects in a variety of industries including financial services, energy, higher education, government contractors and public sector.

Specific experience

- Conducted a county-wide, digital transformation assessment that impacted over 45 county departments. Developed business cases and roadmaps for over 20 initiatives that were presented to the county board
- Led an ERP software evaluation for finance, HR and operations functional areas. Held business process and technical requirement workshops, supported RFP development, vendor demos and selection
- Led the planning and execution of user acceptance testing and system implementation for a recently acquired government contractor to comply with federal regulations and standards
- Supported the operations and digital transformation for the merge of six higher-education organizations into two new entities. Aligned the organization's processes and strategies to ensure an effective merge
- Lead project management analyst for the design, development, testing and deployment of customer-facing mobile applications for a multistate Fortune 500 utility group
 - Responsible for monthly budget reporting and reconciliation supporting supply chain negotiations of external vendor contracts, daily management of risks and issues, tracking business benefits and building an application lifecycle management approach
- Transformed a group of financial institution client's strategic goals into actionable project roadmaps
 - Managed vendor identification, formal RFI/RFP communications, technology demonstrations and pilot discussions for five simultaneous projects focused on virtual and augmented reality, blockchain and biometric identification technologies
- Assisted with the development of customer experience (CX) strategies for financial institutions
 - Collected and analyzed the client's data, conducted credit union member and staff interviews and integrated the data and interview findings into an innovation workshop facilitated with client leadership
 - Created and presented a strategic roadmap to the client team to roll out the innovations and new customer experience journey

Doug McColough



i4x

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Reynoldsburg, Ohio 43068

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dougmccollough@dmcgroup.us

Education

- **Master of Business Administration**, University of Notre Dame, Notre Dame, Indiana
- **Bachelor of Business Administration**, Information Systems and Operations Management, University of Toledo, Toledo, Ohio

Summary

Results-driven Chief Information Officer and IT leader with over 25 years of experience in transforming public sector technology landscapes. Founded DMC Group, Inc. to leverage extensive experience in IT programs, broadband expansion, smart city initiatives, smart mobility innovation, technology workforce development, and local/regional economic development. Adept at providing strategic advisory and consulting services to municipalities, nonprofits, and regional governments.

Professional Experience

- CEO, DMC Group, Inc. (Current)
 - Provides expert advisory and consulting services in:
 - Information Technology programs
 - Broadband Internet Expansion programs
 - Smart City development
 - Smart Mobility innovation
 - Technology Workforce Development
 - Local and Regional Economic Development
 - Clients include The Columbus Zoo, City of Dublin, City of New Albany, and City of East Cleveland.
- Executive Director, The Beta District
- Executive Director, Intelligent Community Forum Institute, Dublin, Ohio
- CIO, City of Dublin, Ohio
- Director of Information Technology, City of Richmond, Virginia
- CIO, The Industrial Commission of Ohio
- Deputy CIO, Ohio Department of Commerce

Doug McColough

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Subject Matter Expertise

- Data Management and Analytics Initiatives
- Smart City Thought Leadership
- Cyber Security Experience and Accountability
- Policy and Governance Development
- Broadband Expansion Leadership
- Innovation Acceleration
- Diverse Tech Workforce Development
- Digital Experience
- Cross Functional Leadership and Organization
- Communication and Presentation Expertise

Boards and Committees

- Former Central Ohio Transit Authority Board of Trustees
- Per Scholas Columbus Advisory Board
- Tech Corps National Executive Board
- Black Tech Columbus Executive Board

Awards and Honors

- 2018 Ohio Public Sector CIO Academy CIO of the Year Award
- 2017 Columbus Business First C-Suite Award
- 2018 TEDx Columbus Speaker
- 2019 Top 25 Doers, Dreamers, and Drivers Award
- 2020 Champion for Women Award from EmpoWE-R Women of Information Security